

1 James H. Wilkins, #116364
2 WILKINS, DROLSHAGEN & CZESHINSKI LLP
3 6785 N. Willow Ave.
Fresno, CA 93710
Telephone: (559) 438-2390
Facsimile: (559) 438-2393

4 Attorneys for Plaintiff, LANCE ANDERSON, Guardian Ad Litem of MAURINE ANDERSON

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9 **UNITED STATES DISTRICT COURT**
10 **EASTERN DISTRICT OF CALIFORNIA**

11 LANCE ANDERSON, as Guardian Ad Litem of Case No. 1:22-cv-00165-DAD-EPG
12 MAURINE ANDERSON

13 Plaintiff,

14 v.

15 ALLIANZ LIFE INSURANCE COMPANY OF Case No. 1:22-cv-00165-DAD-EPG
16 NORTH AMERICA, and Does 1 through 50,
inclusive,

17
18 **AMENDED STIPULATION RE
CONFIDENTIALITY AND
PROTECTIVE ORDER**

19
20 (ECF No. 9)

21
22 Defendants.

23 **1. PURPOSES AND LIMITATIONS**

24 Discovery in this action is likely to involve production of confidential, proprietary, or private
information for which special protection from public disclosure and from use for any purpose other
than prosecuting this litigation may be warranted. Accordingly, the parties hereby stipulate to and
petition the Court to enter the following Stipulated Protective Order. The parties acknowledge that
this Order does not confer blanket protections on all disclosures or responses to discovery and that
the protection it affords from public disclosure and use extends only to the limited information or

1 items that are entitled to confidential treatment under the applicable legal principles. The parties
2 further acknowledge, as set forth in Section 12.3, below, that this Stipulated Protective Order does
3 not entitle them to file confidential information under seal.

4 **A. GOOD CAUSE STATEMENT**

5 This action is likely to involve trade secrets, development, commercial, financial, personal,
6 technical and/or proprietary information for which special protection from public disclosure and
7 from use for any purpose other than prosecution of this action is warranted. Such confidential and
8 proprietary materials and information consist of, among other things, confidential business or
9 financial information, information regarding confidential business practices, or other confidential
10 research, development, or commercial information (including information implicating privacy
11 rights of third parties), information otherwise generally unavailable to the public, or which may be
12 privileged or otherwise protected from disclosure under state or federal statutes, court rules, case
13 decisions, or common law. Accordingly, to expedite the flow of information, to facilitate the prompt
14 resolution of disputes over confidentiality of discovery materials, to adequately protect information
15 the parties are entitled to keep confidential, to ensure that the parties are permitted reasonable
16 necessary uses of such material in preparation for and in the conduct of trial, to address their
17 handling at the end of the litigation, and serve the ends of justice, a protective order for such
18 information is justified in this matter. It is the intent of the parties that information will not be
19 designated as confidential for tactical reasons and that nothing be so designated without a good faith
20 belief that it has been maintained in a confidential, non-public manner, and there is good cause why
21 it should not be part of the public record of this case.

22 More specifically, and in compliance with Local Rule 141.1(c), the parties make the
23 following representations:

24 1. The types of information eligible for protection include medical records of Maurine
25 Anderson and personal information regarding Maurine Anderson contained in those medical
26 records, including, but not limited to her address, her birthdate, her Social Security number,
27 and other information that could be used to “steal” her identity; information regarding
28 Maurine Anderson’s finances; evaluation of the information contained in Maurine

1 Anderson's medical records by Allianz claims personnel; analysis of coverage issues by
2 Allianz claims personnel in light of the information contained in Maurine Anderson's
3 medical records;

4 2. The need for the protection to be provided by the protective order concerns the privacy
5 interests of Maurine Anderson in the information contained in her medical records and her
6 finances; Allianz's internal evaluation of the information contained in Maurine Anderson's
7 medical records; and Allianz's analysis of coverage provided by the subject insurance policy
8 as applied to Maurine Anderson's claim in light of the information contained in Maurine
9 Anderson's medical records; and

10 3. The Parties anticipate that certain information to be protected by the protective order will be
11 relied on by the Parties in certain pleadings and other documents that may be filed with the
12 Court, and the Parties need the protection of the Court order to prevent disclosure of that
13 certain information via the public nature of those pleadings and other documents.

14 **2. DEFINITIONS**

15 2.1 Action: The above-entitled action.

16 2.2 Challenging Party: A Party or Non-Party that challenges the designation of
17 information or items under this Order.

18 2.3 "CONFIDENTIAL" Information or Items: information (regardless of how it is
19 generated, stored, or maintained) or tangible things that qualify for protection under Federal Rule
20 of Civil Procedure 26(c), and as specified above in the Good Cause Statement.

21 2.4 Counsel: Outside Counsel of Record and House Counsel (as well as their support
22 staff).

23 2.5 Designating Party: A Party or Non-Party that designates information or items that it
24 produces in disclosures or in responses to discovery as "CONFIDENTIAL."

25 2.6 Disclosure or Discovery Material: all items or information, regardless of the medium
26 or manner in which it is generated, stored, or maintained (including, among other things, testimony,
27 transcripts, and tangible things), that are produced or generated in disclosures or responses to
28 discovery in this matter.

1 2.7 Expert: a person with specialized knowledge or experience in a matter pertinent to
2 the litigation who has been retained by a party or its counsel to serve as an expert witness or as a
3 consultant in this Action.

4 2.8 House Counsel: attorneys who are employees of a party to this Action. House
5 Counsel does not include Outside Counsel of Record or any other outside counsel.

6 2.9 Non-Party: any natural person, partnership, corporation, association, or other legal
7 entity not named as a party to this action.

8 2.10 Outside Counsel of Record: attorneys who are not employees of a party to this
9 Action but are retained to represent or advise a party to this Action and have appeared in this Action
10 on behalf of that party or are affiliated with a law firm which has appeared on behalf of that party
11 and includes support staff.

12 2.11 Party: any party to this Action, including all of its officers, directors, employees,
13 consultants, retained experts, and Outside Counsel of Record (and their support staffs).

14 2.12 Producing Party: a party or non-party that produces Disclosure or Discovery
15 Material in this Action.

16 2.13 Professional Vendors: persons or entities that provide litigation support services
17 (e.g., photocopying, videotaping, translating, preparing exhibits or demonstrations, and organizing,
18 storing, or retrieving data in any form or medium) and their employees and subcontractors.

19 2.14 Protected Material: any Disclosure or Discovery Material that is designated as
20 "CONFIDENTIAL."

21 2.15 Receiving Party: a party that receives Disclosure or Discovery Material from a
22 Producing Party.

23 **3. SCOPE**

24 The protections conferred by this Stipulation and Order cover not only Protected Material
25 (as defined above), but also (1) any information copied or extracted from Protected Material; (2) all
26 copies, excerpts, summaries, or compilations of Protected Material; and (3) any testimony,
27 conversations, or presentations by parties or their Counsel that might reveal Protected Material.

1 Any use of Protected Material at trial shall be governed by the orders of the trial judge. This
2 Order does not govern the use of Protected Material at trial.

3 **4. DURATION**

4 Once this case proceeds to trial, all of the information that was designated as confidential or
5 maintained pursuant to this protective order may become public and may be presumptively available
6 to all members of the public, including the press, unless compelling reasons supported by specific
7 factual findings to proceed otherwise are made to the trial judge in advance of the trial. See
8 Kamakana v. City and County of Honolulu, 447 F.3d 1172, 1180-81 (9th Cir. 2006) (distinguishing
9 “good cause” showing for sealing documents produced in discovery from “compelling reasons”
10 standard when merits-related documents are part of court record). Accordingly, the terms of this
11 protective order do not extend beyond the commencement of the trial.

12 Nothing in this protective order operates to preclude any Party to this protective order from
13 seeking further protection of confidential materials after the commencement of trial.

14 **5. DESIGNATING PROTECTED MATERIAL**

15 5.1 Exercise of Restraint and Care in Designating Material for Protection. Each Party or
16 Non-Party that designates information or items for protection under this Order must take care to
17 limit any such designation to specific material that qualifies under the appropriate standards. The
18 Designating Party must designate for protection only those parts of material, documents, items, or
19 oral or written communications that qualify so that other portions of the material, documents, items,
20 or communications for which protection is not warranted are not swept unjustifiably within the
21 ambit of this Order. Mass, indiscriminate, or routinized designations are prohibited. Designations
22 that are shown to be clearly unjustified or that have been made for an improper purpose (e.g., to
23 unnecessarily encumber the case development process or to impose unnecessary expenses and
24 burdens on other parties) may expose the Designating Party to sanctions.

25 If it comes to a Designating Party’s attention that information or items that it designated for
26 protection do not qualify for protection, that Designating Party must promptly notify all other Parties
27 that it is withdrawing the inapplicable designation.

5.2 Manner and Timing of Designations. Except as otherwise provided in this Order (see, e.g., second paragraph of section 5.2(a) below), or as otherwise stipulated or ordered, Disclosure or Discovery Material that qualifies for protection under this Order must be clearly so designated before the material is disclosed or produced.

Designation in conformity with this Order requires:

(a) For information in documentary form (e.g., paper or electronic documents, but excluding transcripts of depositions or other pretrial or trial proceedings), that the Producing Party affix at a minimum, the legend “CONFIDENTIAL” (hereinafter “CONFIDENTIAL legend”), to each page that contains protected material. If only a portion or portions of the material on a page qualifies for protection, the Producing Party also must clearly identify the protected portion(s) (e.g., by making appropriate markings in the margins).

A Party or Non-Party that makes original documents available for inspection need not designate them for protection until after the inspecting Party has indicated which documents it would like copied and produced. During the inspection and before the designation, all of the material made available for inspection shall be deemed “CONFIDENTIAL.” After the inspecting Party has identified the documents, it wants copied and produced, the Producing Party must determine which documents, or portions thereof, qualify for protection under this Order. Then, before producing the specified documents, the Producing Party must affix the “CONFIDENTIAL legend” to each page that contains Protected Material. If only a portion or portions of the material on a page qualifies for protection, the Producing Party also must clearly identify the protected portion(s) (e.g., by making appropriate markings in the margins).

(b) for testimony given in depositions that the Designating Party identify the Disclosure or Discovery Material on the record, before the close of the deposition all protected testimony.

(c) for information produced in some form other than documentary and for any other tangible items, that the Producing Party affix in a prominent place on the exterior of the container or containers in which the information is stored the legend "CONFIDENTIAL." If only a portion or portions of the information warrants protection, the Producing Party, to the extent practicable, shall identify the protected portion(s).

7 5.3 Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to
8 designate qualified information or items does not, standing alone, waive the Designating Party's
9 right to secure protection under this Order for such material. Upon timely correction of a
10 designation, the Receiving Party must make reasonable efforts to assure that the material is treated
11 in accordance with the provisions of this Order.

6. CHALLENGING CONFIDENTIALITY DESIGNATIONS

13 6.1 Timing of Challenges. Any Party or Non-Party may challenge a designation of
14 confidentiality at any time that is consistent with the Court’s Scheduling Order.

15 6.2 Meet and Confer. The Challenging Party shall initiate the dispute resolution process.

16 6.3 The burden of persuasion in any such challenge proceeding shall be on the
17 Designating Party. Frivolous challenges, and those made for an improper purpose (e.g., to harass or
18 impose unnecessary expenses and burdens on other parties) may expose the Challenging Party to
19 sanctions. Unless the Designating Party has waived or withdrawn the confidentiality designation,
20 all parties shall continue to afford the material in question the level of protection to which it is
21 entitled under the Producing Party's designation until the Court rules on the challenge.

7. ACCESS TO AND USE OF PROTECTED MATERIAL

23 7.1 Basic Principles. A Receiving Party may use Protected Material that is disclosed or
24 produced by another Party or by a Non-Party in connection with this Action only for prosecuting,
25 defending, or attempting to settle this Action. Such Protected Material may be disclosed only to the
26 categories of persons and under the conditions described in this Order. When the Action has been
27 terminated, a Receiving Party must comply with the provisions of section 13 below (FINAL
28 DISPOSITION).

1 Protected Material must be stored and maintained by a Receiving Party at a location and in
2 a secure manner that ensures that access is limited to the persons authorized under this Order.

3 7.2 Disclosure of “CONFIDENTIAL” Information or Items. Unless otherwise ordered
4 by the court or permitted in writing by the Designating Party, a Receiving Party may disclose any
5 information or item designated “CONFIDENTIAL” only to:

- 6 (a) the Receiving Party’s Outside Counsel of Record in this Action, as well as employees
7 of said Outside Counsel of Record to whom it is reasonably necessary to disclose the
8 information for this Action;
- 9 (b) the officers, directors, and employees (including House Counsel) of the Receiving
10 Party to whom disclosure is reasonably necessary for this Action;
- 11 (c) Experts (as defined in this Order) of the Receiving Party to whom disclosure is
12 reasonably necessary for this Action and who have signed the “Acknowledgment and
13 Agreement to Be Bound” (Exhibit A);
- 14 (d) the court and its personnel;
- 15 (e) court reporters and their staff;
- 16 (f) professional jury or trial consultants, mock jurors, and Professional Vendors to
17 whom disclosure is reasonably necessary for this Action and who have signed the
18 “Acknowledgment and Agreement to Be Bound” (Exhibit A);
- 19 (g) the author or recipient of a document containing the information or a custodian or
20 other person who otherwise possessed or knew the information;
- 21 (h) during their depositions, witnesses, and attorneys for witnesses, in the Action to
22 whom disclosure is reasonably necessary provided: (1) the deposing party requests
23 that the witness sign the form attached as Exhibit 1 hereto; and (2) they will not be
24 permitted to keep any confidential information unless they sign the
25 “Acknowledgment and Agreement to Be Bound” (Exhibit A), unless otherwise
26 agreed by the Designating Party or ordered by the court. Pages of transcribed
27 deposition testimony or exhibits to depositions that reveal Protected Material may be
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1 separately bound by the court reporter and may not be disclosed to anyone except as
2 permitted under this Stipulated Protective Order; and

3 (i) any mediator or settlement officer, and their supporting personnel, mutually agreed
4 upon by any of the parties engaged in settlement discussions.

5 **8. PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN**
6 **OTHER LITIGATION**

7 If a Party is served with a subpoena or a court order issued in other litigation that compels
8 disclosure of any information or items designated in this Action as “CONFIDENTIAL,” that Party
9 must:

10 (a) promptly notify in writing the Designating Party. Such notification shall include a
11 copy of the subpoena or court order;
12 (b) promptly notify in writing the party who caused the subpoena or order to issue in the
13 other litigation that some or all of the material covered by the subpoena or order is
14 subject to this Protective Order. Such notification shall include a copy of this
15 Stipulated Protective Order; and
16 (c) cooperate with respect to all reasonable procedures sought to be pursued by the
17 Designating Party whose Protected Material may be affected.

18 If the Designating Party timely seeks a protective order, the Party served with the
19 subpoena or court order shall not produce any information designated in this action
20 as “CONFIDENTIAL” before a determination by the court from which the subpoena
21 or order issued, unless the Party has obtained the Designating Party’s permission.
22 The Designating Party shall bear the burden and expense of seeking protection in
23 that court of its confidential material and nothing in these provisions should be
24 construed as authorizing or encouraging a Receiving Party in this Action to disobey
25 a lawful directive from another court.

26 **9. A NON-PARTY’S PROTECTED MATERIAL SOUGHT TO BE PRODUCED IN**
27 **THIS LITIGATION**

- (a) The terms of this Order are applicable to information produced by a Non-Party in this Action and designated as “CONFIDENTIAL.” Such information produced by Non-Parties in connection with this litigation is protected by the remedies and relief provided by this Order. Nothing in these provisions should be construed as prohibiting a Non-Party from seeking additional protections.
- (b) In the event that a Party is required, by a valid discovery request, to produce a Non-Party’s confidential information in its possession, and the Party is subject to an agreement with the Non-Party not to produce the Non-Party’s confidential information, then the Party shall:
 - (1) promptly notify in writing the Requesting Party and the Non-Party that some or all of the information requested is subject to a confidentiality agreement with a Non-Party;
 - (2) promptly provide the Non-Party with a copy of the Stipulated Protective Order in this Action, the relevant discovery request(s), and a reasonably specific description of the information requested; and
 - (3) make the information requested available for inspection by the Non-Party, if requested.
- (c) If the Non-Party fails to seek a protective order from this court within 14 days of receiving the notice and accompanying information, the Receiving Party may produce the Non-Party’s confidential information responsive to the discovery request. If the Non-Party timely seeks a protective order, the Receiving Party shall not produce any information in its possession or control that is subject to the confidentiality agreement with the Non-Party before a determination by the court. Absent a court order to the contrary, the Non-Party shall bear the burden and expense of seeking protection in this court of its Protected Material.

10. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL

If a Receiving Party learns that, by inadvertence or otherwise, it has disclosed Protected Material to any person or in any circumstance not authorized under this Stipulated Protective Order,

1 the Receiving Party must immediately (a) notify in writing the Designating Party of the unauthorized
2 disclosures, (b) use its best efforts to retrieve all unauthorized copies of the Protected Material, (c)
3 inform the person or persons to whom unauthorized disclosures were made of all the terms of this
4 Order, and (d) request such person or persons to execute the “Acknowledgment and Agreement to
5 Be Bound” that is attached hereto as Exhibit A.

6 **11. INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE**
7 **PROTECTED MATERIAL**

8 When a Producing Party gives notice to Receiving Parties that certain inadvertently
9 produced material is subject to a claim of privilege or other protection, the obligations of the
10 Receiving Parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This provision
11 is not intended to modify whatever procedure may be established in an e-discovery order that
12 provides for production without prior privilege review. Pursuant to Federal Rule of Evidence 502(d)
13 and (e), insofar as the parties reach an agreement on the effect of disclosure of a communication or
14 information covered by the attorney-client privilege or work product protection, the parties may
15 incorporate their agreement in the stipulated protective order submitted to the court.

16 **12. MISCELLANEOUS**

17 12.1 Right to Further Relief. Nothing in this Order abridges the right of any person to seek
18 its modification by the Court in the future.

19 12.2 Right to Assert Other Objections. By stipulating to the entry of this Protective Order
20 no Party waives any right it otherwise would have to object to disclosing or producing any
21 information or item on any ground not addressed in this Stipulated Protective Order. Similarly, no
22 Party waives any right to object on any ground to use in evidence of any of the material covered by
23 this Protective Order.

24 12.3 Filing Protected Material. A Party that seeks to file under seal any Protected Material
25 must comply with the applicable Local Rule. Protected Material may only be filed under seal
26 pursuant to a court order authorizing the sealing of the specific Protected Material at issue. If a
27 Party’s request to file Protected Material under seal is denied by the court, then the Receiving Party
28 may file the information in the public record unless otherwise instructed by the court.

1 **13. FINAL DISPOSITION**

2 After the final disposition of this Action, as defined in paragraph 4, within 60 days of a
3 written request by the Designating Party, each Receiving Party must return all Protected Material to
4 the Producing Party or destroy such material. As used in this subdivision, "all Protected Material"
5 includes all copies, abstracts, compilations, summaries, and any other format reproducing or
6 capturing any of the Protected Material. Whether the Protected Material is returned or destroyed,
7 the Receiving Party must submit a written certification to the Producing Party (and, if not the same
8 person or entity, to the Designating Party) by the 60-day deadline that (1) identifies (by category,
9 where appropriate) all the Protected Material that was returned or destroyed and (2) affirms that the
10 Receiving Party has not retained any copies, abstracts, compilations, summaries or any other format
11 reproducing or capturing any of the Protected Material. Notwithstanding this provision, Counsel are
12 entitled to retain an archival copy of all pleadings, motion papers, trial, deposition, and hearing
13 transcripts, legal memoranda, correspondence, deposition and trial exhibits, expert reports, attorney
14 work product, and consultant and expert work product, even if such materials contain Protected
15 Material. Any such archival copies that contain or constitute Protected Material remain subject to
16 this Protective Order as set forth in Section 4 (DURATION).

17 **14. VIOLATION OF ORDER**

18 Any violation of this Order may be punished by any and all appropriate measures including,
19 without limitation, contempt proceedings and/or monetary sanctions.

20 IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

22 Dated: March 29, 2022

/s/ James H. Wilkins
Attorneys for Plaintiff

25 Dated: March 29, 2022


Attorneys for Defendant

EXHIBIT A

ACKNOWLEDGMENT AND AGREEMENT TO BE BOUND

I, _____, of _____, declare under penalty of perjury that I have read in its entirety and understand the Stipulated Protective Order that was issued by the United States District Court for the Central District of California in the case of Patrocina A. Ramsey v. Farmers New World Life Insurance Company, Case No. 1:19-cv-00405-DAD-SAB. I agree to comply with and to be bound by all the terms of this Stipulated Protective Order and I understand and acknowledge that failure to so comply could expose me to sanctions and punishment in the nature of contempt. I solemnly promise that I will not disclose in any manner any information or item that is subject to this Stipulated Protective Order to any person or entity except in strict compliance with the provisions of this Order.

13 I further agree to submit to the jurisdiction of the United States District Court for the Eastern District
14 of California for the purpose of enforcing the terms of this Stipulated Protective Order, even if such
15 enforcement proceedings occur after termination of this action. I hereby appoint
16 _____ of _____ as my
17 California agent for service of process in connection with this action or any proceedings related to
18 enforcement of this Stipulated Protective Order.

19 | Date:

20 | City and State where sworn and signed:

21 Printed name:

22 | Signature:

ORDER

Pursuant to the parties' stipulation (ECF No. 9), IT IS ORDERED that the parties' amended stipulated protective order is hereby approved.

IT IS SO ORDERED.

Dated: March 30, 2022

/s/ Eric P. Groj
UNITED STATES MAGISTRATE JUDGE